

HOW TO COMPLETE YOUR eGRANT APPLICATION: NATIONAL DIRECTS, EDUCATION AWARD PROGRAMS, INDIAN TRIBES, U.S. TERRITORIES, AND SOUTH DAKOTA

Here are the steps to complete your eGrants application.

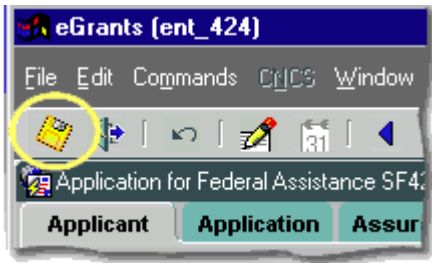
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❖ Before you start

Before you can complete an application in eGrants you must do the following:

- A. Set up your computer to use eGrants and create an eGrants account.
 1. Each computer used to access eGrants must be configured correctly.
 2. Also, each person who is completing information in the application on eGrants, needs to set up his/her own eGrants account.
 3. For instructions on these procedures go to the eGrants section on the Corporation website (www.nationalservice.org).
- B. Know the names of the certifying official(s).
 1. You will need to select the name(s) of your certifying official(s) as you complete the application. If his/her name is not already in the eGrants database, your grantee administrator will need to enter them in the *Maintain People* form.
 2. The certifying official(s) for your application will need to create his/her own eGrants account in order to log in and certify the application.
- C. Have a copy of the application instructions, as well as the 2003 AmeriCorps Guidelines. The application instructions will provide you with the name of the Notice of Funds Availability (NOFA) under which you need to apply and specific information you need to include in your application. The guidelines provide information you must consider as you develop your application.

As you follow the steps below, save your work frequently. A good rule of thumb is to save every 5-10 minutes, or as you complete each Tab. This will greatly reduce your frustration if you lose your Internet connection or accidentally close your browser. You can use the yellow diskette icon in the upper left corner or F10 on your keyboard to save.



As you work, you may occasionally see a pop-up box asking if you'd like to "commit" the changes you've made. This is simply a reminder to save.

Step One: Initiate a new application

- A. Open *eGrants*
 1. Log on to *eGrants*.
 2. Click on the *Applications* node (plus sign next to the folder) in the *eGrants* menu tree on the left.
 3. Double-click on *Application for Federal Assistance (SF-424)*.
- B. Start a new application
 1. Click the *Insert New Record* icon on the tool bar (a green plus (+) sign) OR click the *Start New Application* button on the bottom, left-hand portion of the screen.



You'll see this window:

2. The *Legal Applicant* field will be filled in automatically for you. For question 1, select *Directly to the Corporation*.
 3. Click the “*LOV*” (List of Values) button (it’s the little triangle to the right of the “NOFA” field) in question 2 and select the appropriate NOFA. See your application instructions for the name of your NOFA.
 4. For question 3, if you are applying for a new grant - this includes applicants currently in the final year of a grant cycle - select *New*. If you are currently in the first or second year of a three-year grant, select *Continuation*. If you are requesting an Amendment to an existing grant, select *Amendment*. For Continuations and Amendments, you will be prompted to enter the number of the current grant.
 5. By default, your name appears in the *Name of Authorized Representative* field. If you are not the authorized representative, click the *LOV* for other choices. If the appropriate name is not in the list, the *Grantee Administrator* can add the name to the database. The Authorized Representative will need to create a personal eGrants account in order to log in and certify the application.
 6. Click on *Proceed*. A box will appear letting you know that your application has been created and will give you an application ID number. You must write down the application ID number. You will need this number later to retrieve your application if you did not complete it or need to make edits before you submit it.
 7. Click *OK*.
- C. You are now looking at the application that you will need to complete.
1. For AmeriCorps*National applicants, the application is comprised of seven menu tabs.
 2. For Education Award Program (EAP), Indian Tribes, U.S. Territories and South Dakota applicants, the application is comprised of six menu tabs.

Step Two: the Applicant tab

- A. Complete the relevant fields on this page according to the application instructions. Hints on some of the fields:
- ❑ **Application ID** appears in the upper-left corner. It is not your grant number, but a unique identifier for your application, automatically generated by eGrants. Write it down! It will help you find your application later.
 - ❑ **Application Due Date** has been filled in based on the NOFA you selected in Step One.
 - ❑ **Legal Applicant** section has been completed based on the information you entered in Step One.
 - ❑ **Project Title** is the name of your program. Click on the LOV (List of Values or drop-down menu) to select your project name. If the project name is not listed or you need to update the contact information, click on *Enter/Edit Program*.

- ❑ **Project Director** is the name of your national AmeriCorps program director. Click on the LOV to select your project director. If the project director is not listed, or you need to update his/her contact information, click on *Enter/Edit Contact*.
 - ❑ **Application ID and Program Description** in the upper right corner are not applicable to you. Leave them blank.
 - ❑ **Report** is a tool for viewing and printing your application and budget. You don't need to use it yet.
- B. Save your work by clicking on the yellow disk icon on the toolbar or by pressing F10 on your keyboard.

Step Three: the Application tab

- A. Complete the relevant fields on this page according to the application instructions. Hints on some of the fields:
- ❑ **Application is Subject to Review by State Executive Order 12372 Process.** Ignore this field. It doesn't apply to you.
 - ❑ **Applicant is Delinquent on any Federal Debt.** Check the box if your organization is in fact delinquent and enter an explanation to the right.
 - ❑ **Proposed Project Period Start and End Dates.** You can use the calendar function on the toolbar for assistance in figuring out your dates.
 - ❑ **Estimated Funding** will be automatically filled in after you create your budget.
 - ❑ **Organization Characteristics.** Use the LOV to the right of each field to select the characteristics that describe your organization. Choose as many as apply. If you need to select more than six characteristics, put your cursor in one of the fields, and click on the *Insert New Record* icon on the tool bar (green + sign). A blank field will appear.
- B. Save your work by clicking on the yellow disk icon in the upper left or by pressing F10.

Step Four: Assurances and Certifications tab

If you are the Authorized Certifying Official (Authorized Representative), you can complete this tab now. Otherwise, that person will need to log onto eGrants and follow the instructions below.

- A. **Assurances** – The person you selected as the *Authorized Representative* in Step One appears here as the certifying official. This person needs to click the *View/Print Assurances* button, then the *I Agree* button, then the *Accept* button in the pop-up box.
- B. **Certifications** – There are two certifications you must complete. Select the certifying official from the LOV. This person needs to click the *View/Print Certifications* button, then the *I Agree* button, then the *Accept* button in the pop-up box.
- C. Note: eGrants will not allow you to click on *I Agree* without first clicking on *View/Print*
- D. Save your work by clicking on the yellow disk icon in the upper left or by pressing F10.

Step Five: Narratives tab

- A. The narrative section headings are listed on the left. Complete each section according to the application instructions. Select the first narrative section heading and enter the narrative text in the large box on the right. Repeat for each section.
- B. Save your work by clicking on the yellow disk icon in the upper left or by pressing F10.

Step Six: Performance Measures tab

- A. **Service Category** – In this section, select the service categories that describe your AmeriCorps program. Service categories describe your program overall and are not linked to any particular performance measure.
 1. Click the *LOV* in the first line to choose your first category. You can simply scroll, or type a few letters or a word into the Find box and click the *Find* button to narrow your category choices.
 2. To select more than three categories, click the *Insert New Record* icon on the toolbar. Repeat for as many additional categories as needed.



- B. **Measure Type** – Use the next set of boxes to record the number and type of performance measures you have.
 1. Put your cursor in the small box to the left of the first line. Enter the number “1” to designate your first performance measure.
 2. Select the type of your first performance measure from the LOV, for example “Needs and Service Activities.” (Don’t worry about entering the performance measure content yet; we’ll get to that in a bit. For now, we want to make a placeholder for all your performance measures.)
 3. Put your cursor in the small box to the left of the second line, and enter “2.” Select the type of your second performance measure in the LOV. For example, this might be your second “Needs and Service Activities” performance measure.
 4. Repeat as many times as necessary to enter all your performance measure types.
 5. To add more than three performance measure types, click the *Insert New Record* icon on the toolbar
- C. **Performance Measure** – Use this last section of the *Performance Measures tab* to input the content of your performance measures.

1. Go back up to the *Measure Type* section and highlight the first Measure Type that you entered. You'll see labels appear in the *Performance measure* section below where you'll enter your content for this performance measure.
 - a. In the *Performance measure* section, highlight the first label, "Activities". Enter your Activity Statement in the box to the right.
 - b. Highlight the second label, *Results*. Enter your results Statement in the box to the right.
 - c. Repeat for all the lines.
2. Repeat step 1 to highlight your second performance measure type and enter content for your second performance measure. Repeat until you've entered content for all your performance measures.
3. Save your work by clicking on the yellow disk icon in the upper left or by pressing F10.

Step Seven: Subapplications tab

(Not applicable for Education Award Program, Indian Tribes, U.S. Territories, or South Dakota applicants)

On this tab you enter information about your operating sites, including their budgets.

- A. Click the *Create Subapplication* button at the bottom of the screen to enter your first site.
- B. A window will pop up with the following message: *Please enter/select the organization and program names for the subapplication you are trying to create.* Click *OK*.
- C. The next window contains fields for the *Legal Applicant* and the *Program Name*. *Legal Applicant* in this case refers to the organizations running your program at each operating site.

1. Click the triangle to the right of the *Legal Applicant* field to select from a list of operating sites in the LOV.
 - a. Click the *Edit Organization* button to verify the site address, to add the organization's EIN (employer identification number) if it is missing, and to select *Characteristics*.
 - b. If you are a first time applicant, there will not be any sites listed.
 - c. If your sites don't appear in the LOV, click the *Edit Organization* button and enter the site information in the window that pops up.

2. Click the triangle to the right of the *Program Name* field to select the program name.
 - a. If the program name is not listed, click the *Enter/Edit Program* button and type the program name.
 - b. In the event that the program contact information is different than that of the operating site (legal applicant), enter that information by clicking the *Enter/Edit Program* button.
- D. Click *Save/Create Subapplication*. Then click on *Yes* in the alert window to confirm.
- E. Repeat steps A through D for each of your operating sites. If you run out of rows, put your cursor in any row, and click the *Insert New Record* icon on the toolbar. This adds a new row.
- F. The *Amount Requested* and *#FTE's* fields are currently 0. These will be inherited from the budget. Next you'll need to enter budgets for each site.
- G. Click on the first *Subapplicant* name and then click on *Enter/Edit Budget*.
 1. Complete the budget according to the Application Instructions.
 - For *Section I. Program Operating Costs*, rather than filling in each line item, put your program operating cost sub-total under *Other Program Operating Costs*.
 - Complete *Section II. Member Costs* and *Section III. Administrative/Indirect Costs*.
- H. Repeat Step G for each operating site.

Step Eight: Documents tab

Documents that you are required to submit in addition to your application are listed here.

- A. Click on the *Documents* tab.
- B. Click on the first *Required Document*.
- C. Click on the LOV to change the status. eGrants won't let you submit your application if the status for any document says *Not Sent*.
- D. Repeat steps A through C for each of the documents listed.
- E. It is not possible to electronically attach documents to your application in eGrants. Refer to the application instructions for where and when to send these documents.

Step Nine: Budget (For AmeriCorps*National this is the Parent Organization Budget.)

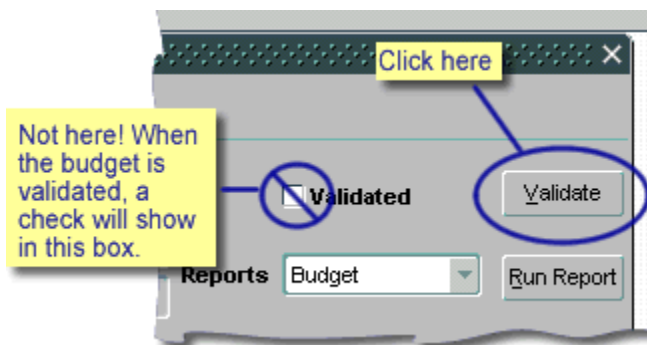
- A. Go to the *Applicant* tab and click on *Enter/Edit Budget*.

The screenshot shows a software interface for managing applications. At the top, there are fields for 'Representative' (Tophat, Sam), 'Telephone Number' (703-456-8976), and 'Title' (Admin). Below these fields is a row of buttons: 'Enter/Edit Budget' (which is circled in blue), 'Verify', 'Open Application', 'Report' (with a dropdown arrow), and 'Run Report'.

- B. Click on an item, for example *A. Personnel Expenses*. The *Details* for that item will be displayed on the right side of the screen.
1. Click on line 1 and enter information into the fields, according to the Application Instructions.
 2. Repeat until you have filled in all relevant personnel expenses.
 3. If you get to the last line and need to enter more items, click the *Insert New Record* icon.



- C. Complete each section of the budget this way.
- D. Save your work frequently!
- E. Validating your budget
1. When you have finished entering your budget, save it, then click on the *Validate* button in the upper-right corner. eGrants will check for mathematical errors and compliance with budget rules, such as required minimum match percentages.



2. If a validation error is found, an error message box will appear.
 - a. Click on the first error message then click on *Go to error*.
 - b. If you then close the error message box, your cursor will be on the error.
 3. Correct all errors and then validate the budget. A checkmark (✓) will appear next to the word *Validated* when you have successfully corrected all errors.
- F. Viewing/Printing your budget and budget narrative.
1. In the *Reports* section in the upper right of the screen, select *Budget* in the LOV and then click *Run Report*.
 2. You can scroll through your budget on the screen or print a copy to review.
 3. Repeat Step H, but this time select *Budget Narrative*.

4. You do not have to wait until you have finished entering the budget information before you view/print your budget and budget narrative.

Congratulations! You're ready to submit your application.

Step Ten: Submit your Application

A. Viewing/Printing your application

1. Go to the *Applicant* tab
2. In the *Reports* section in the lower left of the tab, select *Application for Federal Assistance* in the LOV and then click *Run Report*.
3. You can scroll through your application on the screen or print a copy to review.
4. Make changes in your application as necessary by going to the relevant tab.

B. Verifying your application

1. Go to the Applicant tab and click the *Verify* button.
2. eGrants will verify that all required sections of the application are completed.
3. If an error box appears, correct the errors and click *Verify* again.

C. When you are confident that your application is ready to be submitted, Click on the *Submit Application* button at the bottom of the tab. Note: once you have submitted your application, you are no longer able to make changes. Your application will be in 'read only' so you will be able to review it but you won't be able to edit it.



❖ **Getting back to your application.** Here's how you can get back to your saved application at any time.

- A. Log on to eGrants (see Section III and IV if you need a reminder).
- B. Click on the *Applications* node in the eGrants menu tree on the left (plus sign next to the folder).
- C. Double-click on *Application for Federal Assistance (SF-424)*.
- D. Type in your application ID number in query mode and execute the query. Your saved application should appear.